

Create a New Offer

SUMMARY

The New Offer feature is used to create a copy of an existing transaction. This feature is most useful when a pending offer on a listing has fallen through (or was cancelled/terminated for any reason) and there's now a new offer on the same listing. This feature is also useful when a deal has fallen through and you now need to track new activity on the deal isolated from the fallen-through transaction.

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How Creating a New Offer Works

The following data is copied from the original transaction to the new offer:

- All listing agents
- All docs (except sale docs and buyer docs)
- All checklist tasks except selling agent tasks (optionally)
- All notes (optionally)

Create a New Offer

- 1 Open the transaction and choose [New Offer] from the left menu.
- 2 If you'd like the notes from the original transaction to be copied over to the new offer, check the checkbox for carrying over notes. If you don't want the notes copied, leave it unchecked.
- 3 Click the [Create Offer] button to create your new offer.

New Offer for 64838 Main Street

New Offer Information

Transaction Name


64838 Main Street (#2)

☒ Copy over all checklist tasks (except those assigned to selling agents)

☒ Copy over all notes to the new transaction

Create Offer

Cancel

 **Don't see the *New Offer* option on a transaction?** The *New Offer* option only appears on transactions when:

1. The transaction is in a *Pending* status or beyond (*Other, Closed, Fell Through, Auto Expiry*). [Learn more about Transaction Statuses](#) →
2. Your office has enabled the *New Offer* feature. [Learn how to Enable New Offer](#) →

Carry Over Checklists to New Offers

When creating a new offer, you can choose whether you'd like checklists to be copied over. Note that checklist tasks visible only to selling agents will never be carried over.

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